LESSON 3: Using the Working List and User Notes Objectives

At the conclusion of this lesson, you will be able to:

- *** Identify the primary purpose of the Working List feature.**
- Compare products using the Working List.
- Identify the primary purpose of the User Notes feature.
- Add, remove, edit, and share User Notes.

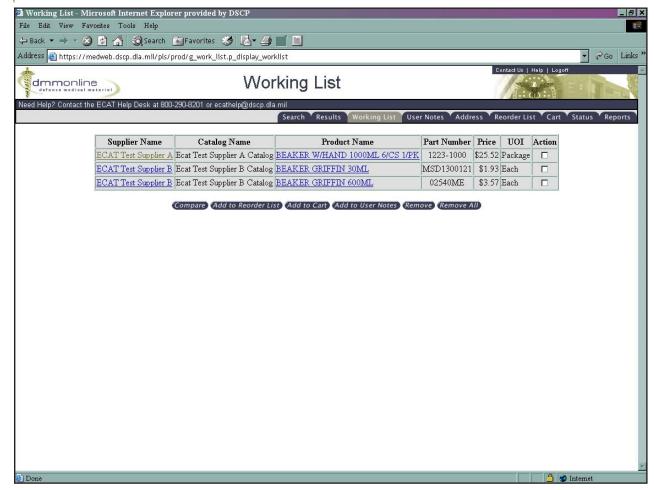
LESSON 3: Using the Working List and User Notes

3.1 The Working List

3.1.1 What is the Working List?

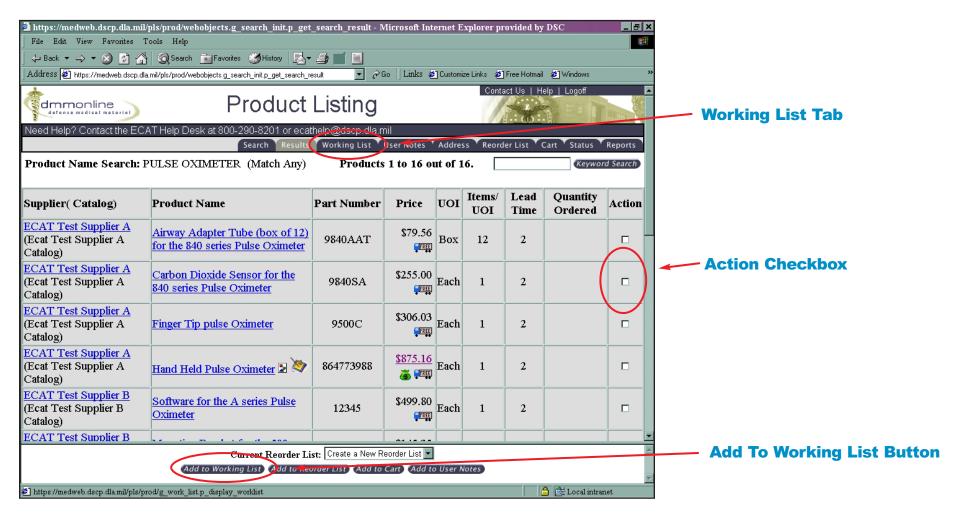
The Working List allows you to list two or more products from the result set on the Product Listing screen in preparation for comparing them, which will be discussed in Section 3.1.3. There is no limit to the number of products that can be added to the Working List, although only three can be compared at any one time. Supplier name, catalog name, product name, part number, and unit of issue (UOI) are elements in the Working List.

The Working List is available for the active session only. It can not be saved. This means that when you log out of the ECAT application or if your session is terminated for any reason, your Working List and any items you are comparing will not be saved.



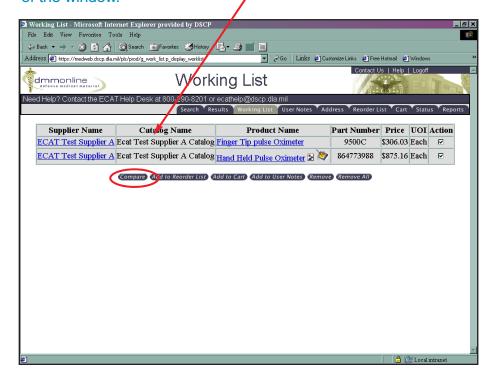
3.1.2 Create a Working List

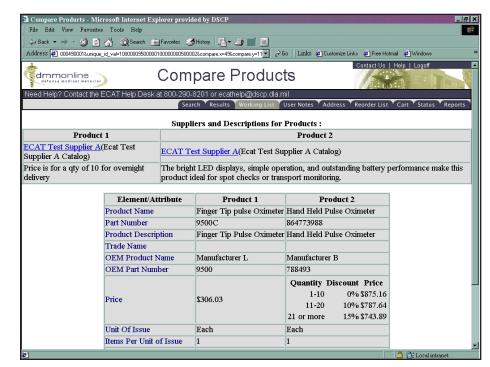
On the Product Listing screen, click the **Action** checkbox for each product you would like to add to the **Working List**. Click the **Add to Working List** button at the bottom of the screen. Click the **Working List** tab at the top of the screen to view the Working List.



3.1.3 Compare Products

To compare products on the **Working List**, click the **Action** checkbox for those items you would like to compare. Click the **Compare** button and the **Compare Products** window will open, listing details of each product side by side. To close the Compare Products window and return to the Working List, click the **Done** button at the bottom of the window.



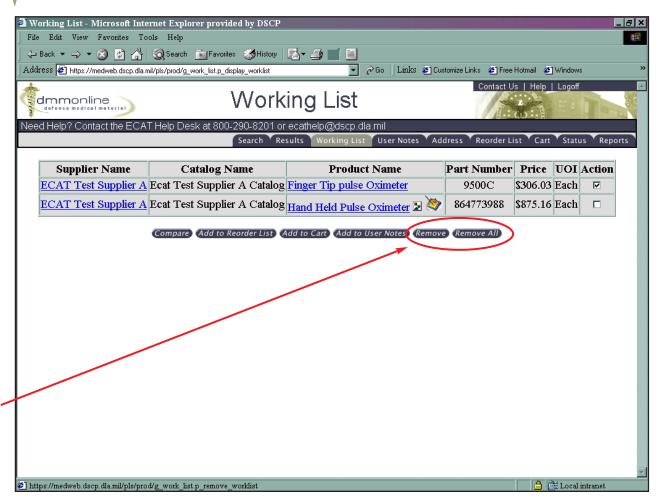


While there is no limit to the number of items you can add to the **Working List**, you can only compare up to three items at a time.

3.1.4 Remove Products from the Working List

To remove an item from the **Working List**, check the appropriate Action box and click the **Remove** button. This will immediately delete the unwanted item from your list.

You can remove all items from the Working List by clicking the **Remove All** button.



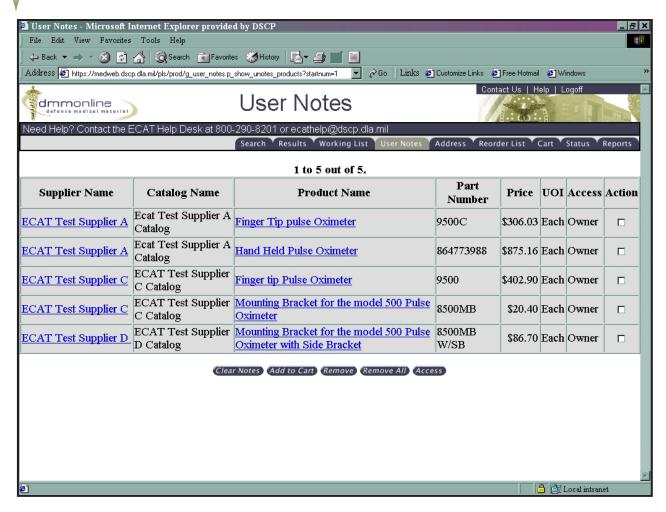
Remove and Remove All buttons

3.2 User Notes

3.2.1 What are User Notes?

The **User Notes** feature enables you to add or remove notes for a specific product. A User Note is a personal comment you have about an item. This page displays a list containing Supplier Name, Catalog Name, Product Name, Part Number, Price and Unit of Issue. You can add a product to your User Notes page from the **Product Listing** or **Working List** pages. This manual will demonstrate the process of adding User Notes from the Product Listing page, but the same steps apply if you start from the Working List.

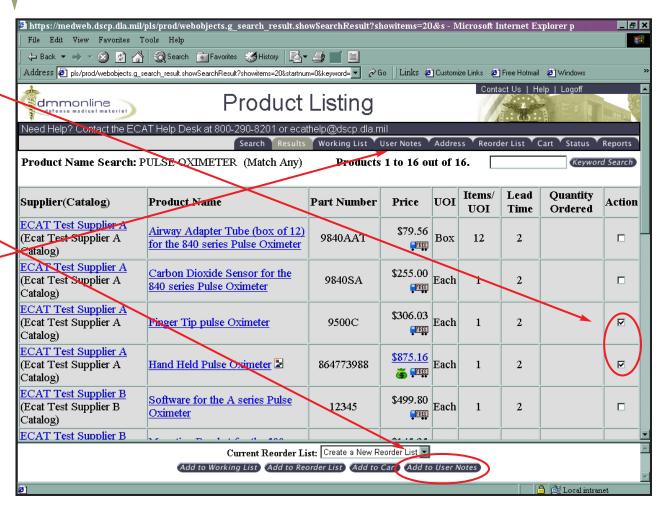
This is an example of the User Notes page.



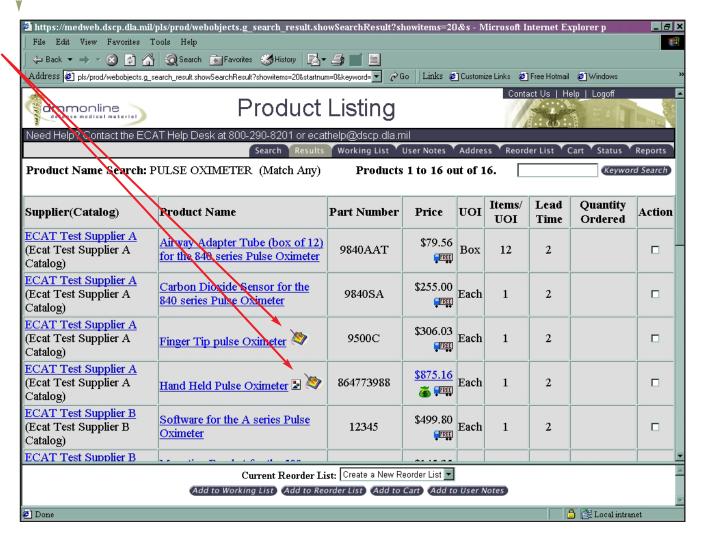
3.2.2 Create a User Notes List

Before adding a user note to an item, you must ensure that the item is included in the User Notes list. To include an item on the User Notes list, follow the steps below.

- Click the Action Box for the item(s) you want to add to your User Notes.
- After the appropriate items are chosen, click the Add to User Notes button. This action will add the User Note icon in the Product Name column. You can view this on the following page.
- Click the **User Notes** tab to get to the Product Details page, where you can type your user note.



Once an item is added to the User Notes page, a **notebook icon** is visible next to the Product Name on the Product Listing page. (This icon is not visible on the User Notes page.)

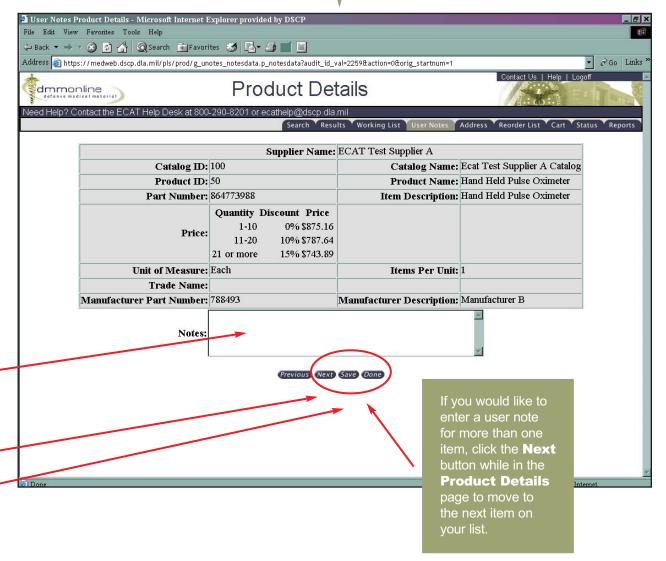


3.2.3 Add a User Note

Once you have created a User Notes list, you are able to add a User Note to an item. From the User Notes page (accessed by clicking on the User Notes tab), click the name of the product for which you want to add a User Note in order to display the **Product Details** page. In addition to displaying Supplier Name, Catalog ID and Name, Product ID and Name, Part Number, Item Description, Price, Unit of Measure, Items per Unit, Trade Name and Manufacturer Part Number and Description, the **Product Details** page provides a place for you to enter notes and personal comments about specific items.

To enter a User Note:

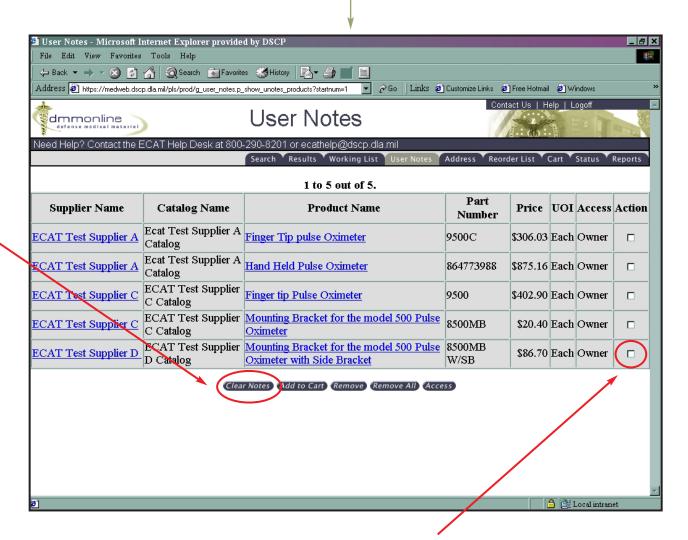
- Click inside the Notes text box.
- Type your note regarding the item.
- Click Save to save your note.
- Click Done to return to the User Notes page.



3.2.4 Remove a User Note

You may remove any notes you have already added.

- Click the User Notes tab to go to the User Notes page.
- Click the **Action** box for the item whose note you want to delete.
- Click the Clear Notes button.

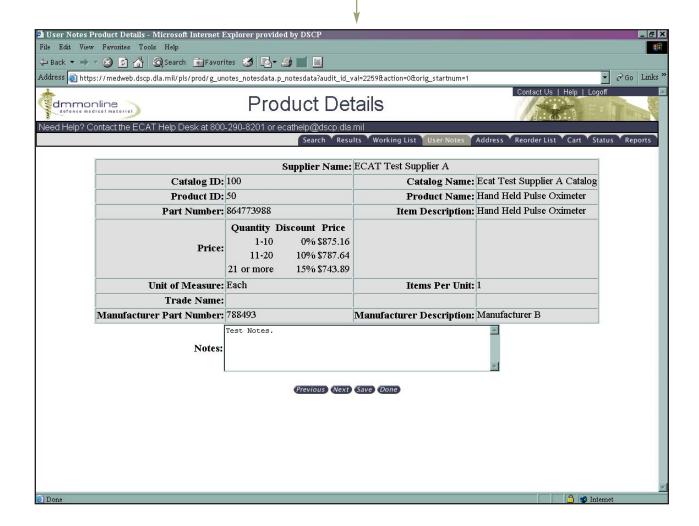


Action box

3.2.5 Edit a User Note

You may edit an existing User Note.

- Click the User Notes tab to go to the User Notes page.
- Click the name of the product whose note you want to edit.
- Make the necessary changes to the note and click the Save button.

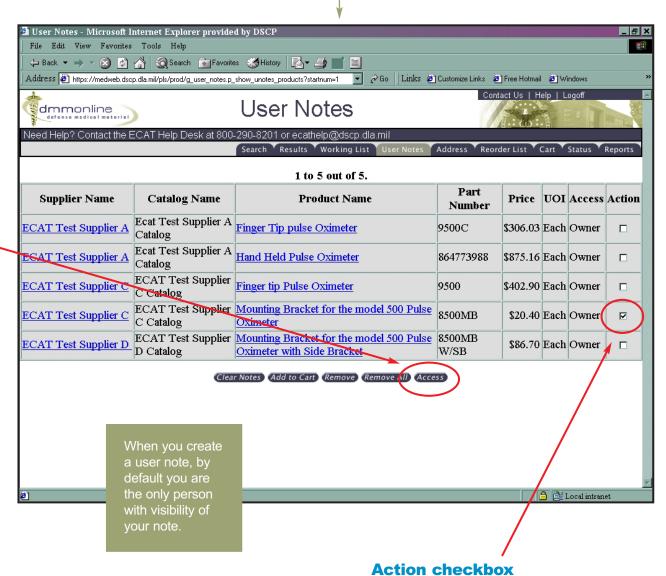


3.2.6 Share Notes

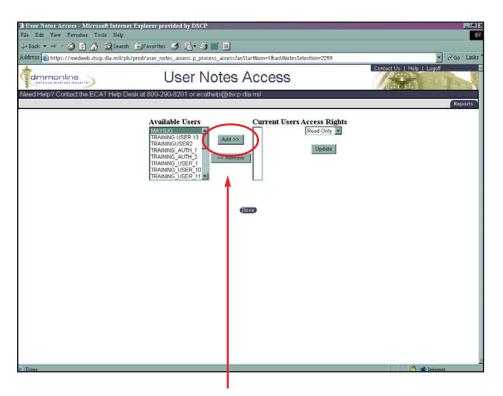
You can choose to allow visibility of notes you author to any or all members of your **User Group**. In addition, you can assign **Read Only** or **Read/Write** access on a user level.

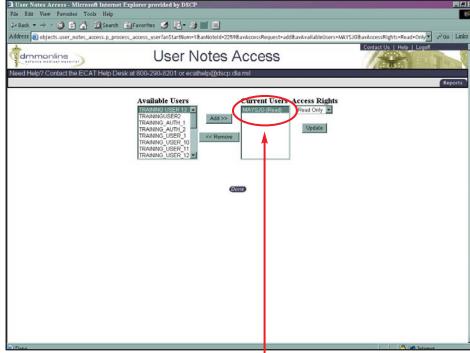
- Click the **Action** box for those items whose notes you wish to share with other members of your User Group.
- Click the Access button. >
- This will take you to the User Notes Access page.

One thing to keep in mind is that if you want to share notes from multiple items, you will have to check each one and set access to it individually. You <u>cannot</u> check multiple items and then click the Access button.



By default, only you can see your User Notes when you access ECAT. Sometimes, though, you might want to let others see them. To grant other users access to your **User Notes**, select a user from the **Available Users** listbox, then click the **Add** button to move the user to the **Current Users** listbox.



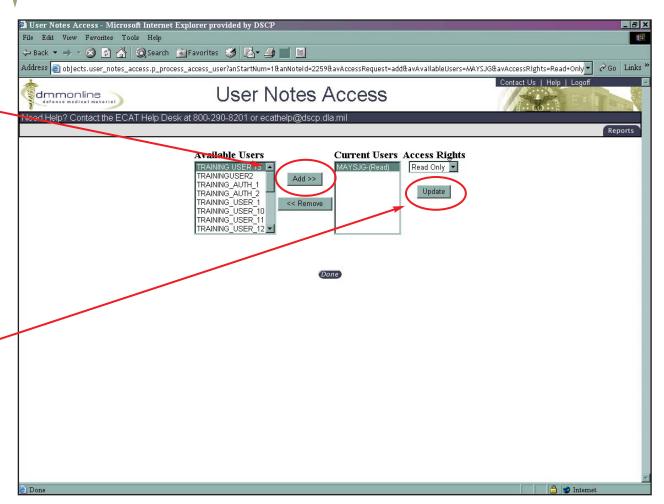


- Highlight appropriate user in Available Users dropdown box.
- Click the Add button.

Solution User appears in the **Current Users** box.

The **User Note Access** page gives you a lot of flexibility when you set the access rights to your User Notes.

- You can add multiple users to your Access list by highlighting each user and clicking the Add button.
- You can grant different users different access rights on the same list by changing the option in the Access Rights dropdown box for each user before clicking the Add button.
- You can change a Current User's access rights after he/she has been added by highlighting the user in the Current User box, changing the option in the Access Rights dropdown box, and clicking the Update button.
- Click **Done** when you are finished setting access rights to your **User Notes** to save your changes.



3.2.6.1 Types of Access

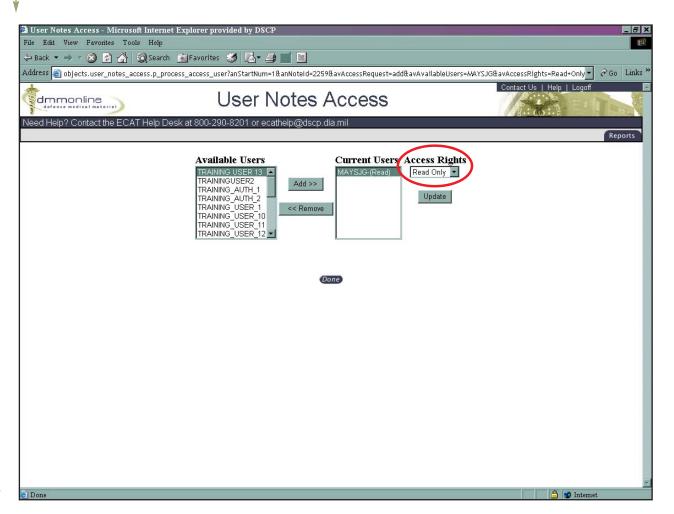
After you have granted users access to your notes, you must set the users' access rights by selecting from the **Access Rights** listbox. There are three types of rights that can be granted to a user:

- **% Owner**
- **Read/Write**
- **Read Only**

Owner - The creator of the note is automatically considered the Owner of the note, granting the creator Owner status. The Owner has the right to add, delete, or edit the note. This user also has the ability to assign access rights to the note. Owner status is transferable among users. However, be aware that once Owner status is transferred, the original Owner retains merely Read Only privileges to the note.

Read/Write - A user with Read/Write privileges has the same note modification privileges as the Owner, but this user cannot change other users' access rights.

Read Only - A user with Read Only privileges may view the note, but this user does not have the right to modify it or change other users' access to it in any way.



After you have selected the appropriate level of access for each user with access to your User Note, click the **Done** button to apply your changes.

1. What is the primary purpose of the Working List?

- a. To allow you to list two or more products from the result set on the Product Listing screen in preparation for comparing them
- b. To allow you to create a list of items that you order on a recurring basis
- c. To provide a place for you to enter notes and personal comments about specific items
- d. To allow you to place items you want to order in the Cart for purchase

2. What is the maximum number of products can be simultaneously added to the Working List?

a. Three

b. Ten

c. Unlimited

d. Two

3. How do you save the Working List?

- a. Click the Save button at the bottom of the Working List page
- b. You can't
- c. The Working List is saved automatically when you leave the page
- d. Click the Working List tab

4. How do you add items to the Working List from the Product Listing screen?

- a. Click the Working List tab. Check the Action checkbox for each item you would like to compare. Click the Compare button
- b. Begin on the Product Listing page. Click the Action checkbox for each product you would like to add to the Working List. Click the Add to Working List button
- c. Click the Working List tab
- d. Check the appropriate Action box in the Working List. Click the Remove button

5. What steps would you take to compare items from the Working List?

- a. Click the Working List tab
- b. Click the Suppliers' names for the items you would like to compare
- c. Click the Working List Tab, and click the Compare button
- d. Click the Working List tab, check the Action checkbox for each item you would like to compare, and click the Compare button

6. What is the purpose of the User Notes feature?

- a. To create lists of items you order on a recurring basis
- b. To provide you with additional information about the product
- c. To enable you to add, edit, or remove a personal comment about an item
- d. To allow you to receive additional information about a supplier

7. From which two pages can you add a product to the User Notes page?

- a. The Product Listing and Working List pages
- b. The Reorder List and Working List pages
- c. The Cart and from the Reorder List page
- d. The Product Listing and Reorder List pages

8. By default, who has access to the User Notes you create?

- a. All members of your User Group
- b. Group Administrators
- c. Order Authorizers
- d. Only you do

9. Which of the following statements does NOT describe the User Notes Access page?

- a. Multiple users can be added to an Access List by highlighting each user and clicking the Add button
- b. Different users can be granted different access rights on the same list
- c. The User Note Access page is not very flexible, since only you can ever see your User Notes when you access ECAT.
- d. A Current User's access rights can be changed after he/she has been added